

TEACHERS' RETIREMENT BOARD  
BENEFITS AND SERVICES COMMITTEE

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SUBJECT: LEVEL OF SERVICE STANDARDS

ITEM NUMBER: 7

ATTACHMENT: 1

ACTION: \_\_\_\_\_

DATE OF MEETING: June 8, 2000

INFORMATION: X

PRESENTER(S): Michael Carter

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**EXECUTIVE SUMMARY**

The Level of Service report provides the Benefits and Services Committee with the necessary information to fulfill its oversight responsibility regarding the delivery of benefits and services to CalSTRS members. The following reports for the month of April 2000.

**I. Overview**

- A. Fiscal Year Allowance Roll: CalSTRS paid a total of 162,422 benefit recipients \$279,822,929 in April 2000. The average monthly allowance roll for FY 1999/2000 is \$278,177,440. Total disbursements for FY 1999/2000 are \$2,781,774,399.
- B. Service Levels: All programs are performing within acceptable variance levels.
- C. Application Volume: An overall increase of seven percent in comparison to the same period last fiscal year.
- D. Interest Payments: The total interest payment volume for April 2000 increased seven percent as compared to April 1999. The dollar amount of interest paid increased thirty-eight percent as compared to April 1999.

**II. Individual Program Reports: Pages 1-7**

**III. Miscellaneous Items: Pages 8 - 10**

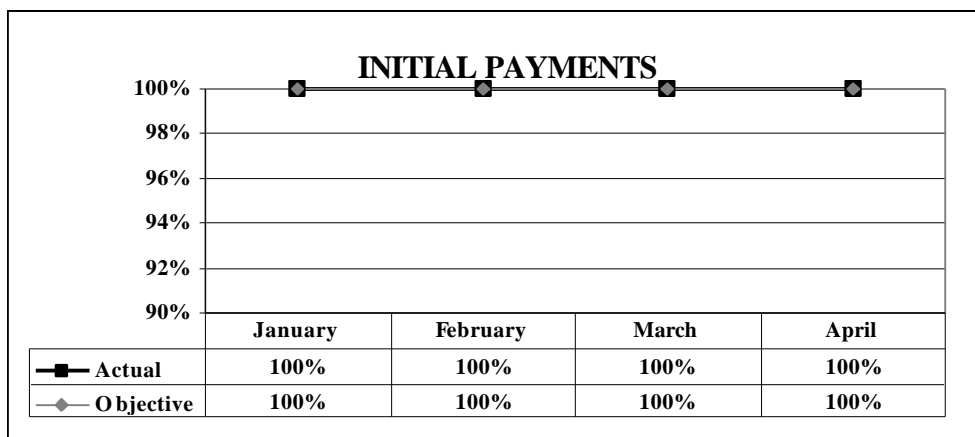
# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## Service Retirements

**Objective** Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.

**Application Volume Change** Plus three percent in comparison to same period last fiscal year.

**Baseline** FY 1998/99 actual: 99 percent

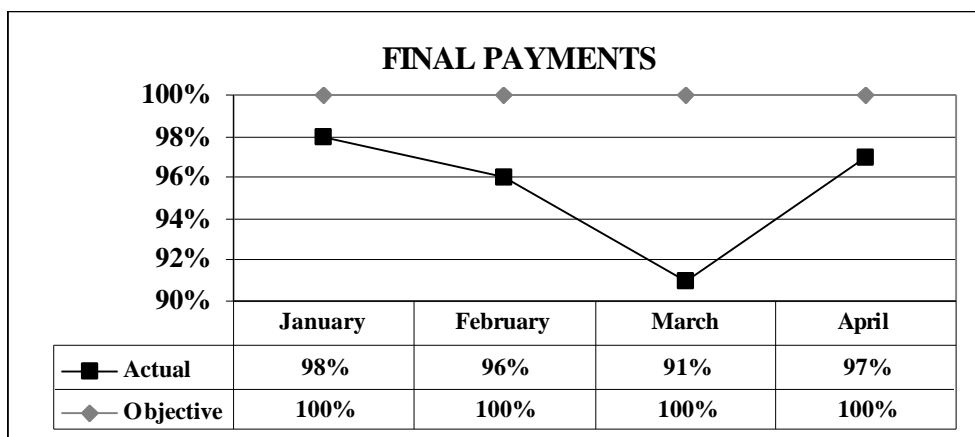


**Year to Date Average: 100%**

**Objective** Process 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.

**Interest Payments** July 1999 – April 2000  
Number of Payments: 291  
Dollar Amount: \$1,930

**Baseline** FY 1998/99 actual: 98 percent

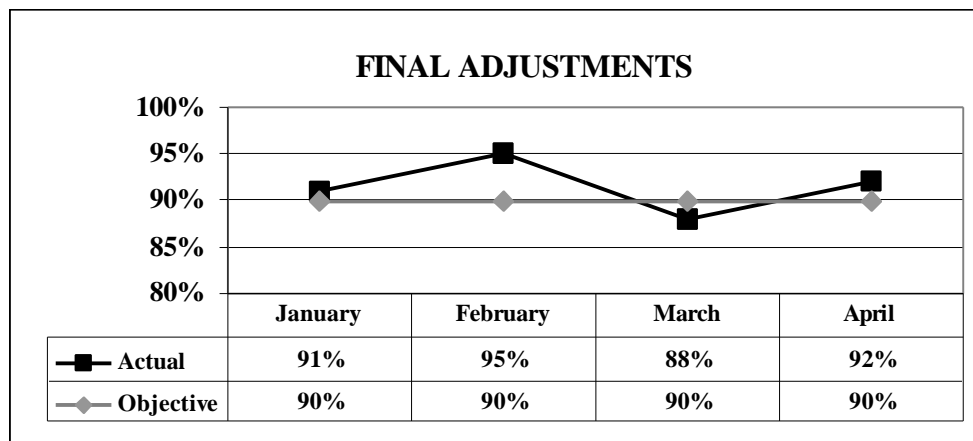


**Year to Date Average 96%**

# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## Service Retirements

**Objective** Finalize 90 percent of all payments within four months of the retirement effective date.



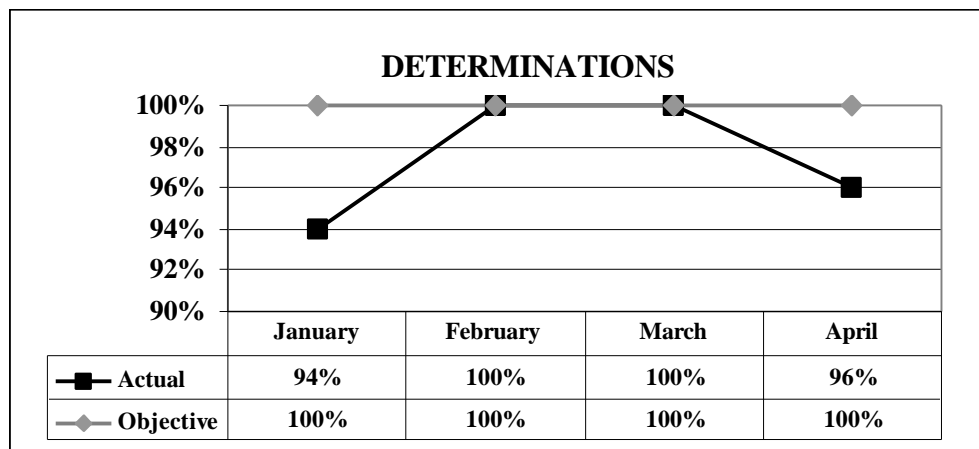
**Baseline** FY 1998/99 actual: 91 percent

**Year to Date Average:** 92%

## Disability

**Objective** Process 100 percent of all eligible applications within 180 days of receipt.

**Application Volume Change** Plus twelve percent in comparison to same period last fiscal year.



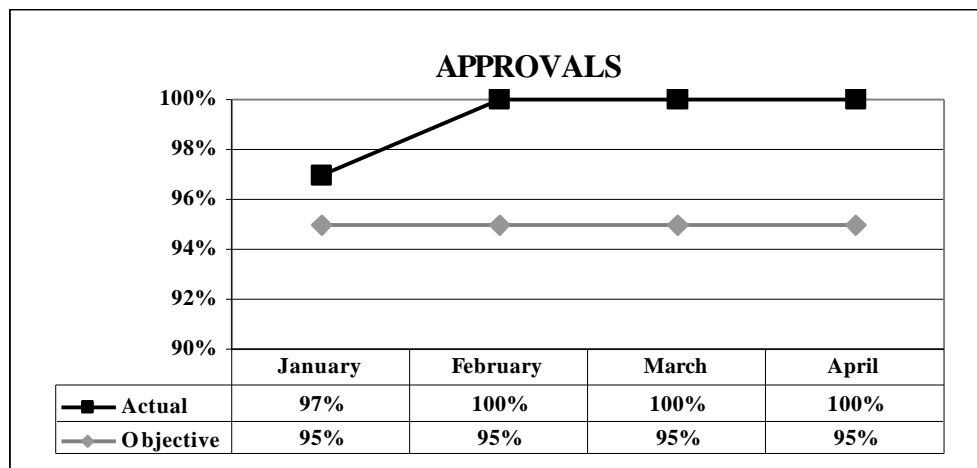
**Baseline** FY 1998/99 actual: 99 percent

**Year to Date Average:** 98%

# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## Disability

**Objective** Process 95 percent of all approvals within 30 days of receipt of all necessary information.

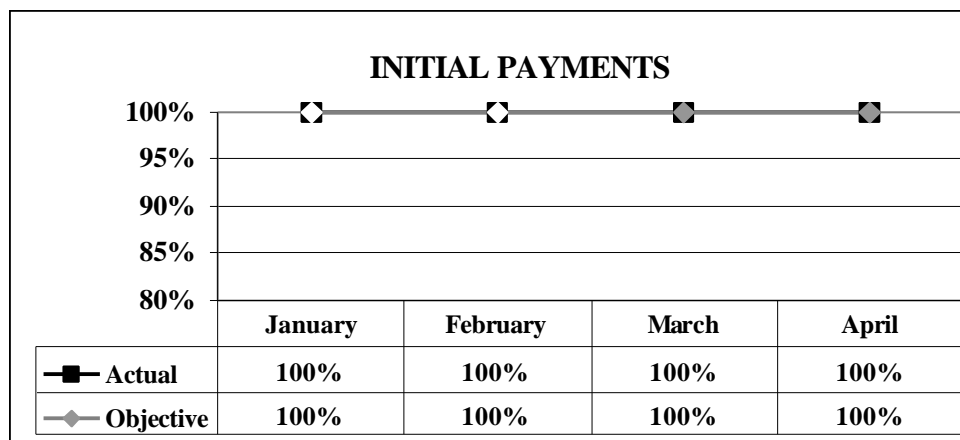


**Baseline** FY 1998/99 actual: 100 percent

**Year to Date Average: 99%**

**Objective** Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.

**Interest Payments** July 1999 – April 2000  
Number of Payments: 0  
Dollar Amount: \$0



**Baseline** FY 1998/99 actual: 100 percent

**Year to Date Average: 100%**

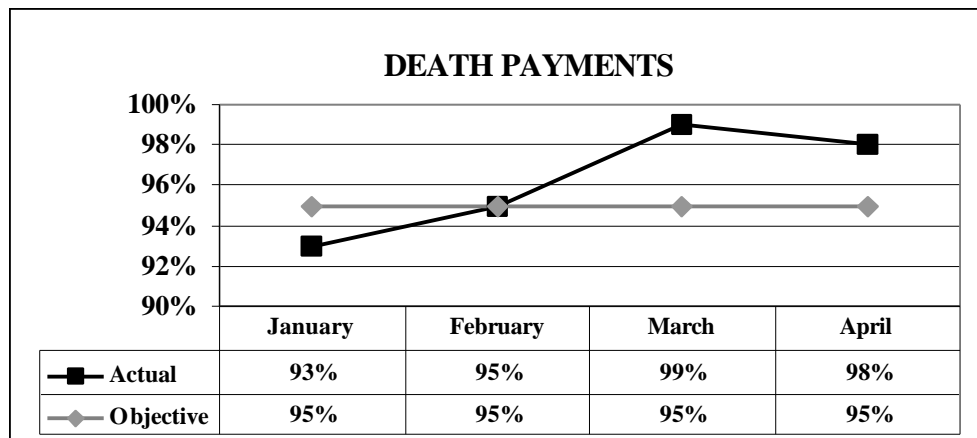
# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## Survivor Benefits

**Objective** Process 95 percent of all applications within 30 days of receipt of all necessary information.

**Application Volume Change** Eleven percent increase in comparison to same period last fiscal year.

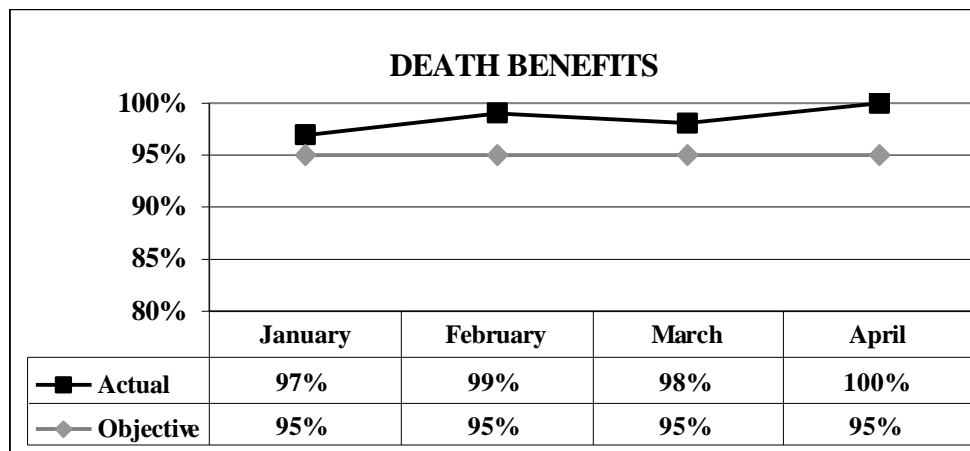
**Interest Payments** July 1999 – April 2000  
Number of Payments: 160  
Dollar Amount: \$18,742



**Baseline** FY 1998/99 actual: 97 percent

**Year to Date Average:** 97%

**Objective** Complete 95 percent of all payments for retired members within 90 days of receipt of notification of death.



**Baseline** FY 1998/99 actual: 93 percent

**Year to Date Average:** 98%

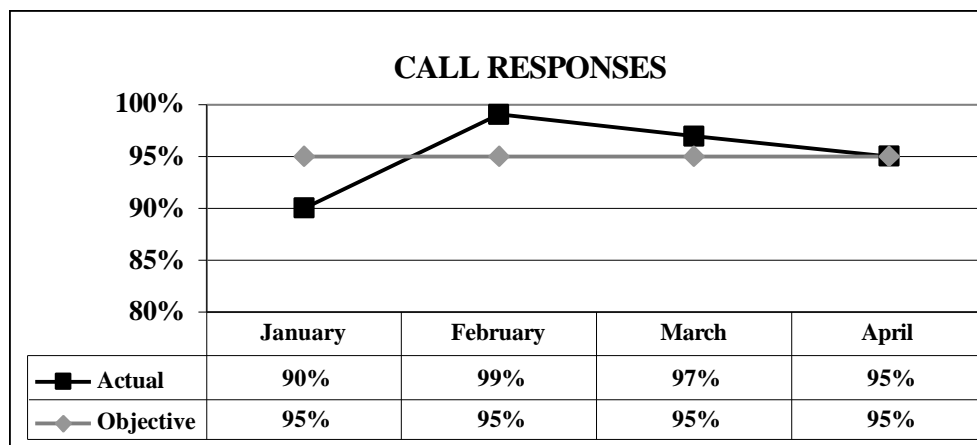
# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## Public Service

**Objective** Answer 95 percent of all calls in less than three minutes.

**Volume Change** -9.43 percent decrease.

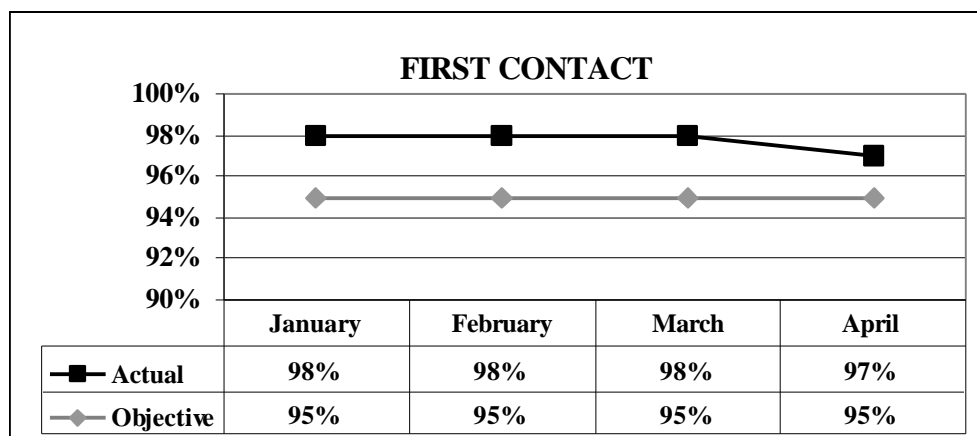
**Notes** Average queue time: 50 seconds  
Longest queue wait: eleven minutes



**Baseline** FY 1998/99 actual: 94 percent  
FY 1996/97 Objective:  
75 percent/less than three minutes.

**Year to Date Average: 93%**

**Objective** Answer 95 percent of all calls on the first contact.



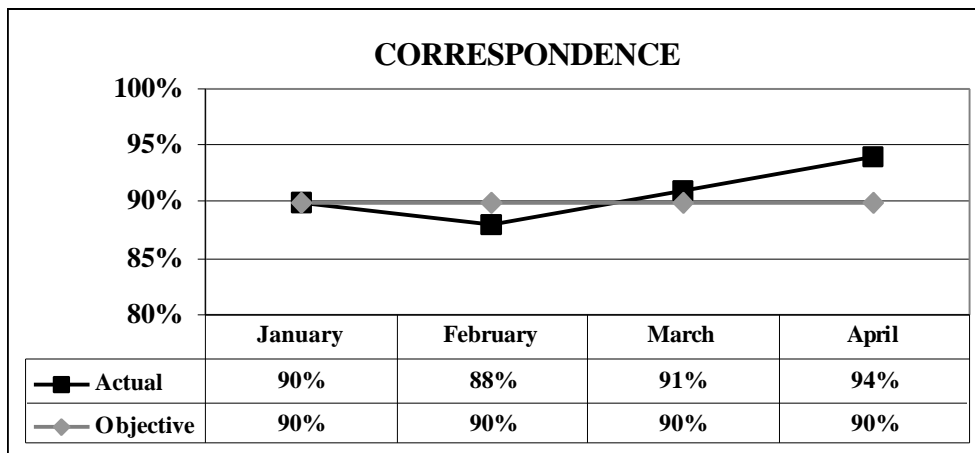
**Baseline** FY 1998/99 actual: 98 percent

**Year to Date Average: 97%**

# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## Public Service

**Objective** Respond to 90 percent of all correspondence in ten working days.

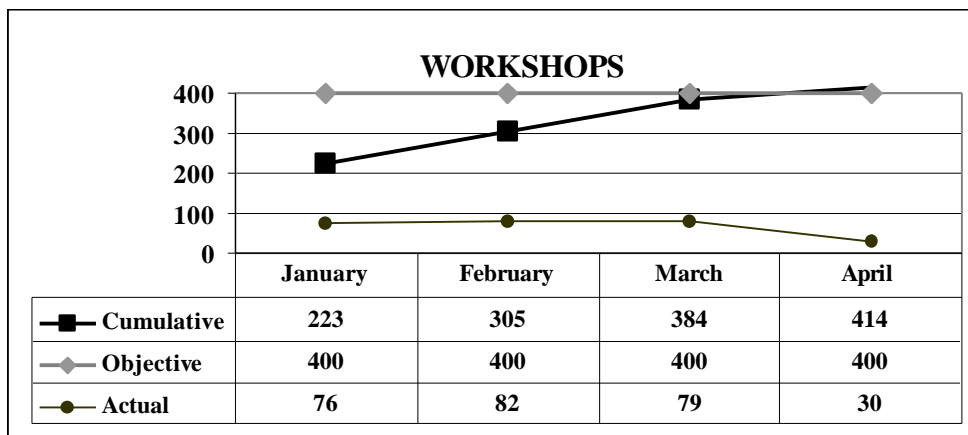


**Baseline** FY 1998/99 actual: 94 percent

**Year to Date Average:** 92%

## Regional Counseling Services

**Objective** Conduct 400 workshops

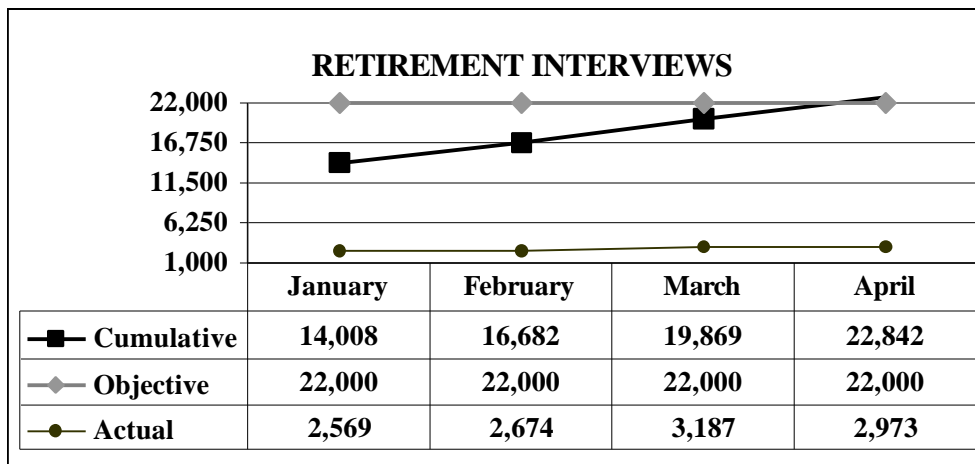


**Baseline** FY 1998/99 actual: 491

# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

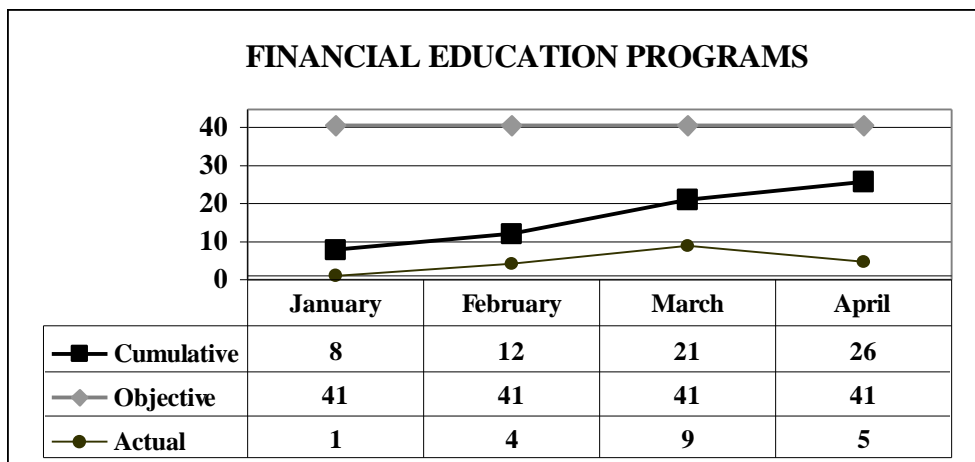
## Regional Counseling Services

**Objective** Provide 22,000 retirement interviews.



**Baseline** FY 1998/99 actual: 24,657

**Objective** Deliver 41 Financial Education Program to CalSTRS members.



**Baseline** FY 1998/99 actual: 32



# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## III. Miscellaneous

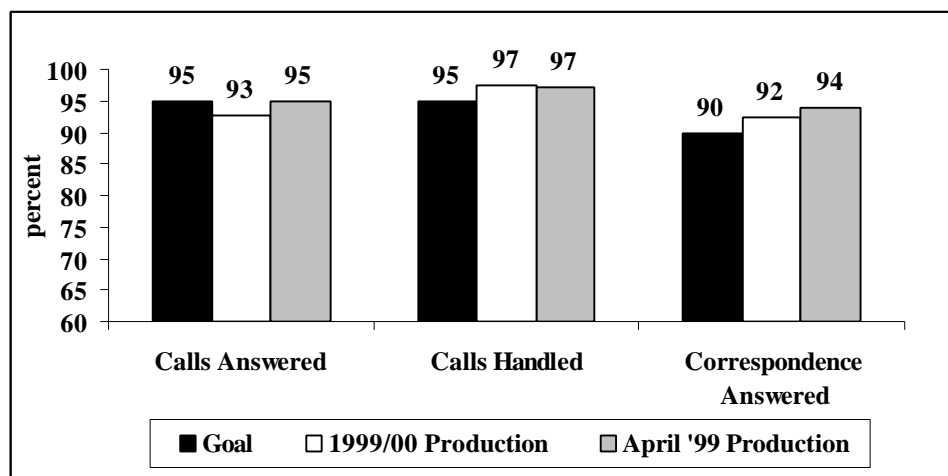
**A. Outstanding Survivor Benefit Cases:** The Education Code requires a report to the Board on outstanding Survivor Benefit cases not paid within six months of the notification of death. As of April 2000, there were 106 cases exceeding this threshold. In March 2000, there were 114 cases beyond the six-month processing period, while in February there were 105 cases exceeding the six-month threshold.

**B. One-Year Final Compensation:** During the current fiscal year, three school districts have chosen to participate in this program.

### C. Golden Handshake:

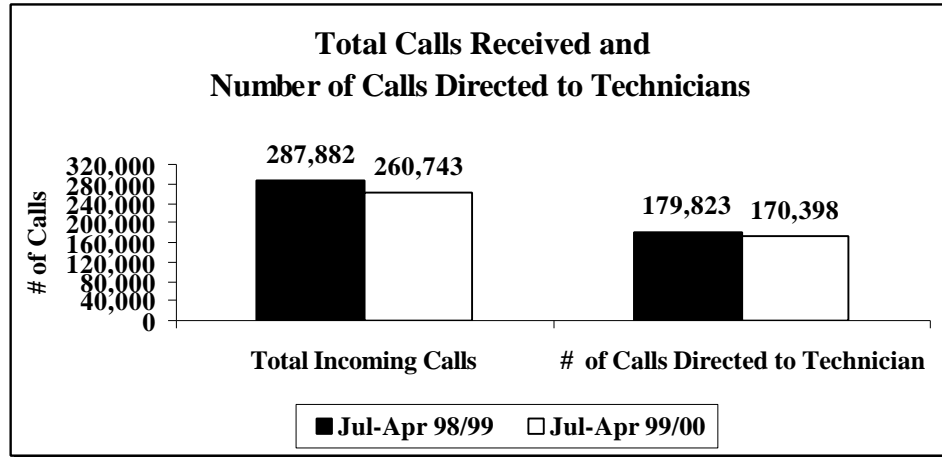
July - April 1999      191 districts / 210 participants  
July - April 2000      88 districts / 141 participants

### D. Telephone Center:



# CalSTRS PRODUCTION OBJECTIVES 1999-2000 FISCAL YEAR

## D. Telephone Center: (continued)



Type	(1) Benchmark 90/91	(2) July-Apr 98/99	(3) July-Apr 99/00	% of Change $\frac{(3) - (2)}{(2)}$	April 2000
Total Incoming Calls	195,858	287,882	260,743	-9.43%	26,579
Technician Calls	117,913	179,823	170,398	-5.24%	18,012
Automated Attendant Calls	31,895	74,973	62,089	-17.18%	6,285
Teletalk Calls	46,050	33,086	28,256	-14.60%	2,282